



The SPICED Module - Instructions

[Winning by Design](#) and [Skuid](#) teamed up to bring the SPICED framework to your Salesforce org!

After you install the SPICED module, you will have 2 new components available:

1. a **SPICED component** for qualifying opportunities
2. a **SPICED dashboard component** for analyzing qualified opportunities

You can add these SPICED components to Lightning pages through the Lightning App Builder.

Here's what the SPICED components might look like in your org after you've added them to Lightning pages.

Opportunity
 Annual Renewal Opportunity

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✓

✓

Formal Proposal Sent

Commit

Closed

✓ Mark Stage as Complete

Activity

Details

Chatter

Opportunity Owner	Skuld IT	Close Date	5/11/2022
Opportunity Name	Annual Renewal Opportunity	Stage	Formal Proposal Sent
Account Name	OAccount	Probability (%)	70%
Type	New Business	Amount	\$20,000.00
Primary Campaign Source		I have qualified this Opportunity	☐
Indicator ⓘ		Credit Card Number ⓘ	
Transaction Id		Months Until Close	
Default#	10		
Photo			
Division			
HighPriority	☐		
Forecast_Commit			
Forecast_BestCase			
Temp_DaysAtCurrentStage			
Manager Amount			
Manager Forecast ⓘ	\$20,000.00		
Most Likely ⓘ	☐		
Forecast Category			

Additional Information

Lead Source	Partner
Next Step	
Description	
JoshLongTextFieldTest	
Rich Text Field	
multiselect picklist	

System Information

Created By	Jason Spangler, 3/11/2021 12:49 PM	Last Modified By	Amy Dewaal, 4/30/2022 2:00 AM
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SPICED

Related

View all related SPICED records

Situation

1

1 - Not in our ICP

They are receiving a lot of feedback from their customers about the pain they are feeling

Pain

2

2 - Identified low-level latent pain, prospect works around the nuisance

Completed internal time study to find out it takes them on average 2 minutes every time they have to go to the other screen, and this happens on average 15 times a day.

Impact

4

4 - Marginal hard cost savings or revenue growth can be predicted

Presented ROI calculations from related opportunity to help guide their own internal ROI business case

Critical Event

4

4 - A specific initiative within the business with a target date and consequences for missing the date

Want to improve efficiency of their sales team by 15% next year. More edits

Decision

4

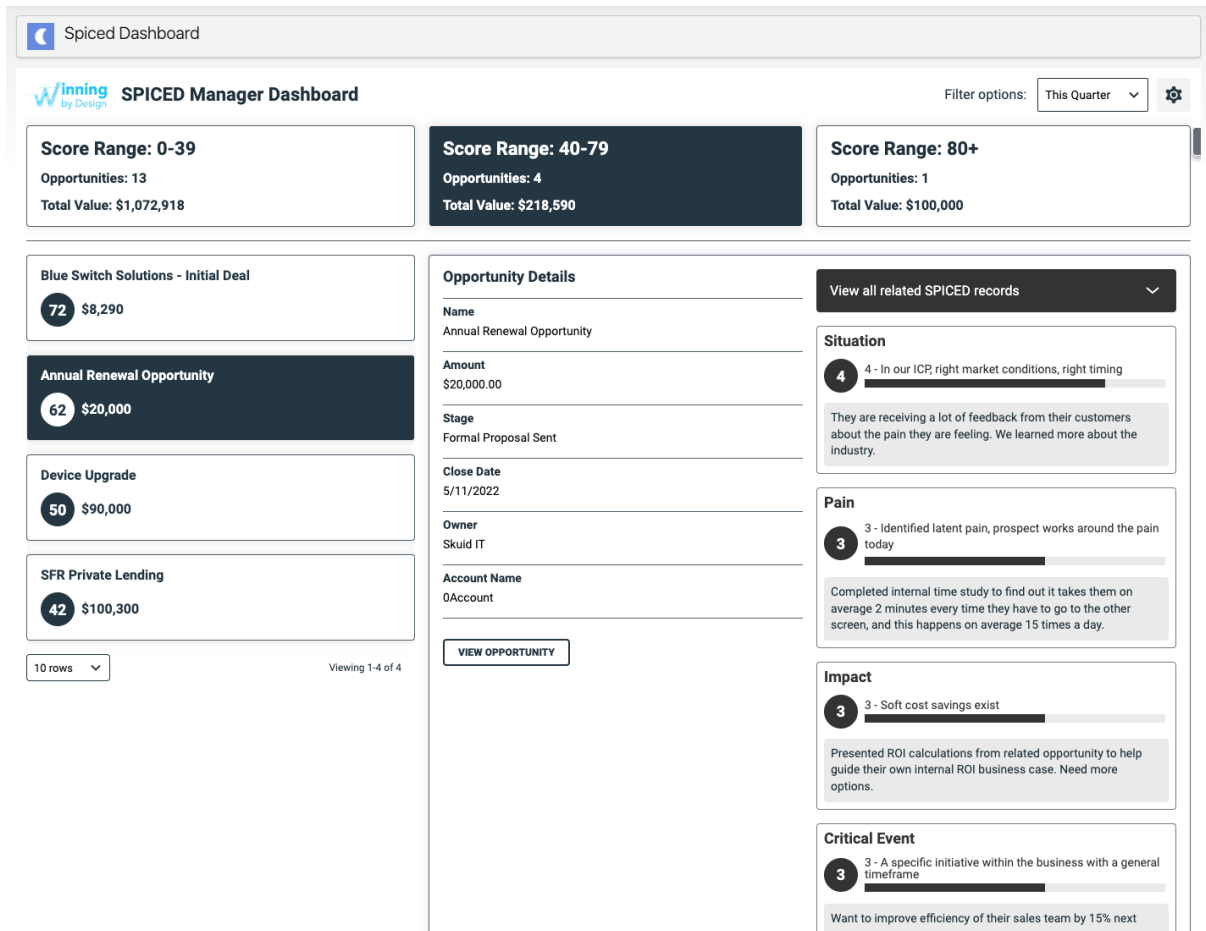
4 - The prospect has clearly articulated the buying process and decision criteria

Technical and Business buyers have been identified

Qualification Score: 70

Learn more about [this component](#)

SPICED Dashboard component in Lightning app page



Prerequisites

To put the SPICED framework to work, you'll need 3 things:

1. Salesforce org

We recommend trying out the SPICED module in a

- [Salesforce developer edition org](#)
- [Sandbox environment](#). (Check with your Salesforce administrator and see if you have a **Full** or **Partial Copy** sandbox available.)

2. Skuid managed package

If you don't already have Skuid in your Salesforce org, you can [install Skuid from our](#)



[website](#)

Why do I need to install Skuid to use the SPICED module?

Fair question! The SPICED module was built with the Skuid app, therefore the Skuid managed package is required for the SPICED components to function.

If you already have Skuid in your Salesforce org, great!

You'll need version **15.0.7** or later of Skuid to install the SPICED module. You can find the version number for Skuid:

- in the Skuid app
 - Go to **Settings > About Skuid**
- in Salesforce Setup
 - Go to **Apps > Packaging > Installed Packages**

If you have an older version of Skuid, go to the [Skuid releases page](#) and install the most recent version.

3. SPICED module

Install the [SPICED module](#) from the Salesforce AppExchange.

Deploy the SPICED components

You've got the Skuid managed package and the SPICED module installed in your Salesforce org. What's next?

We have to add the components to Lightning pages so that you can try out the SPICED framework in your Salesforce org.

SPICED opportunity component

The SPICED opportunity component is a **managed custom component** built with Skuid. That means this component can be added to Lightning pages through the **Lightning App Builder**.

This component was designed to be used on the **Opportunity record page** in Salesforce's Lightning Experience.



To edit the **existing Opportunity record page**:

- Go to an opportunity record in Lightning Experience
- Click the **Setup** icon near your Salesforce avatar
- Click **Edit Page**

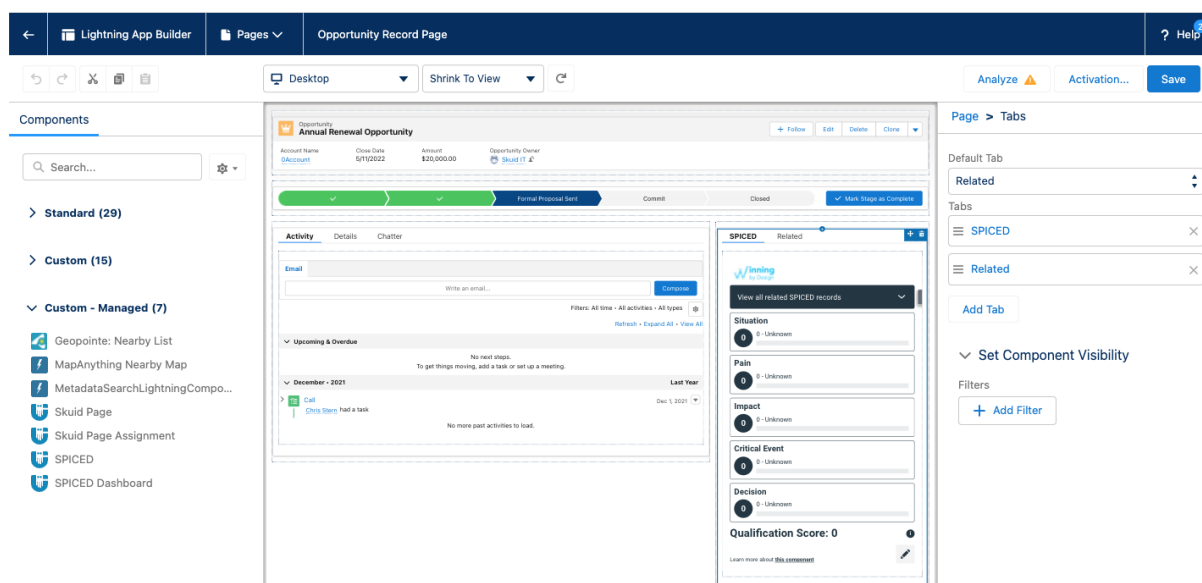
Or you can create a **new Opportunity record page**:

- Click the **Setup** icon near your Salesforce avatar
- Use **Quick Find** to search for **Lightning App Builder**
- Click **New**
- Fill out the Lightning page setup. Make sure you select **Opportunity** for the **Object!**

In the Lightning App Builder, you'll find the **SPICED** component in the **Components > Custom - Managed** panel.

Drag and drop the **SPICED** component into the Lightning page.

In this screenshot, the SPICED component is in the Lightning page sidebar. You can add the component anywhere that Lightning components are allowed. For example, you can add a new tab with a custom label and put the SPICED component there.



The modified Opportunity record page will only appear for people to test when the page is **activated**.

After activation, the page will appear according to the assignment settings you specify, which may be any of the following:

- Org default
- App default



- App, record type, and profile assignment

Save the Opportunity record page - and start testing it out!

SPICED dashboard component

The SPICED dashboard component is also a **managed custom component** built with Skuid. That means this component can be added to Lightning pages through the **Lightning App Builder**.

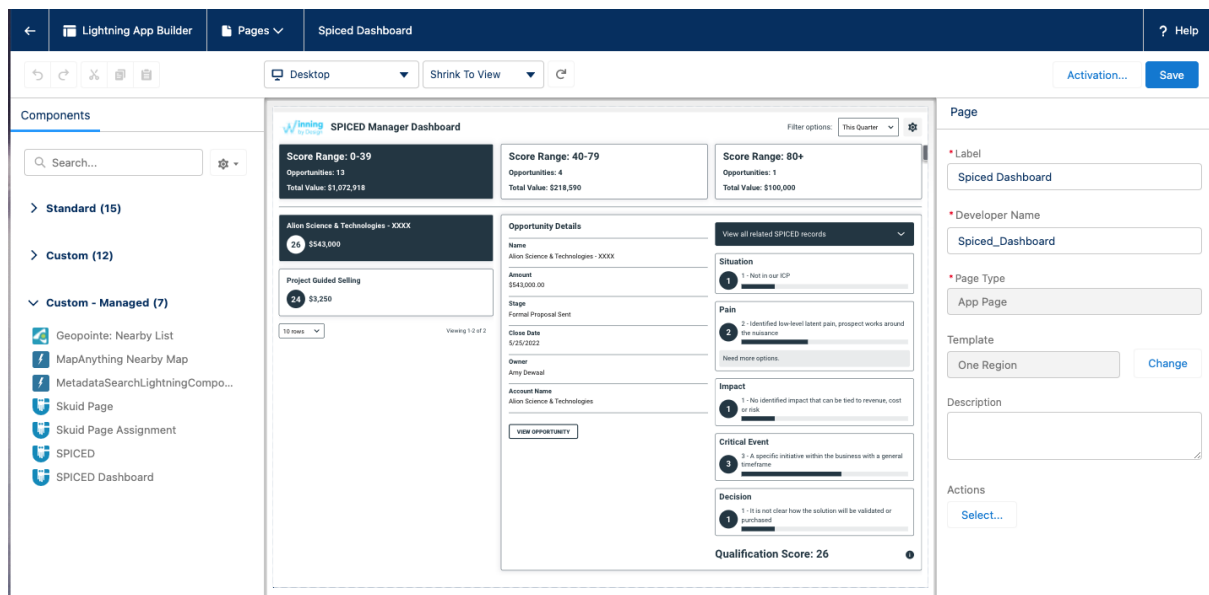
This component was designed to be used on an **App** page in Salesforce's Lightning Experience.

To create a **new App page**:

- Click the **Setup** icon near your Salesforce avatar
- Use **Quick Find** to search for **Lightning App Builder**
- Click **New**
- Fill out the Lightning page setup
 - Select **App Page** for the page type
 - Select **One Region** for the layout

In the Lightning App Builder, you'll find the **SPICED Dashboard** component in the **Components > Custom - Managed** panel.

Drag and drop the **SPICED Dashboard** component into the Lightning page.



The screenshot shows the Lightning App Builder interface. On the left, the 'Components' panel is open, showing a search bar and a list of components under 'Custom - Managed (7)'. The 'SPICED Dashboard' component is highlighted. In the center, a preview of the 'SPICED Manager Dashboard' is shown. It features a header with 'Score Range' filters (0-39, 40-79, 80+), a list of opportunities, and a detailed view of an opportunity. The detailed view includes fields for Name, Amount, Stage, Close Date, Owner, Account Name, and a 'VIEW OPPORTUNITY' button. On the right, the 'Page' configuration panel is visible, showing fields for Label, Developer Name, Page Type, Template, Description, and Actions.



The SPICED dashboard page will only appear for people to test when the lightning page is **activated**. You can decide where it will appear - Add it to your Sales app navigation, or make it a completely standalone app.

Permissions and Licenses needed to used SPICED

The following Salesforce configurations need to be implemented for end users to be able to use the SPICED components in your org. If you are the system administrator that installed the module - these permissions will be granted automatically. But end users that have more limited permissions will only be able to use the SPICED components if they have the following:

Sharing Settings:

- Page object: The Org Wide Default for the Skuid Page object should be Public Read Only.
- SPICED object: This object is controlled by access to the opportunity object.

Permission Sets: Users will need the following Permission Sets

- Skuid Page Viewer
- SPICED User

Object Security:

- SPICED object: Ensure that every user has Read, Create and Update rights to the object. This can be done either by using a profile or permission set.

Installed Packages - Manage Licenses:

- All users of the Spiced module will need to be assigned a License to the Skuid Managed Package.

Automatically adding package licenses and permission sets to new Users.

The Skuid Settings tools provide the ability to automatically add Package Licenses and Permission Sets when new users are activated in the org.

- Open the Skuid App.
- Look at the "Licensing / Permissions" area of Settings.
- This configuration can be "org wide" or for a particular Profile.

This will simplify the process of adding new users to your org so you can ensure they have the permissions you want without having to duplicate actions on adding each user.

With the SPICED components deployed in activated Lightning pages or apps, let's take a look at what your sales people will experience.

Opportunity
Annual Renewal Opportunity

[+ Follow](#)
[Edit](#)
[Delete](#)
[Clone](#)

✓

✓

Formal Proposal Sent

Commit

Closed

✓ Mark Stage as Complete

Activity

Details

Chatter

Opportunity Owner

Skuld IT

Opportunity Name

Annual Renewal Opportunity

Account Name

QAccount

Type

New Business

Primary Campaign Source

Indicator

Transaction Id

Default#

10

Photo

Division

HighPriority

☐

Forecast_Commit

Forecast_BestCase

Temp_DaysAtCurrentStage

Manager Amount

Manager Forecast

\$20,000.00

Most Likely

☐

Forecast Category

Additional Information

Lead Source

Partner

Next Step

Description

JoshLongTextFieldTest

Rich Text Field

multiselect picklist

System Information

Created By

Jason Spangler, 3/11/2021 12:49 PM

Last Modified By

Amy Dewaal, 4/30/2022 2:00 AM

SPICED

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Decision

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4 - The prospect has clearly articulated the buying process and decision criteria

Technical and Business buyers have been identified

Qualification Score: 70

Learn more about this component

Edit the **qualification score** by clicking the pencil icon at the bottom of the component.

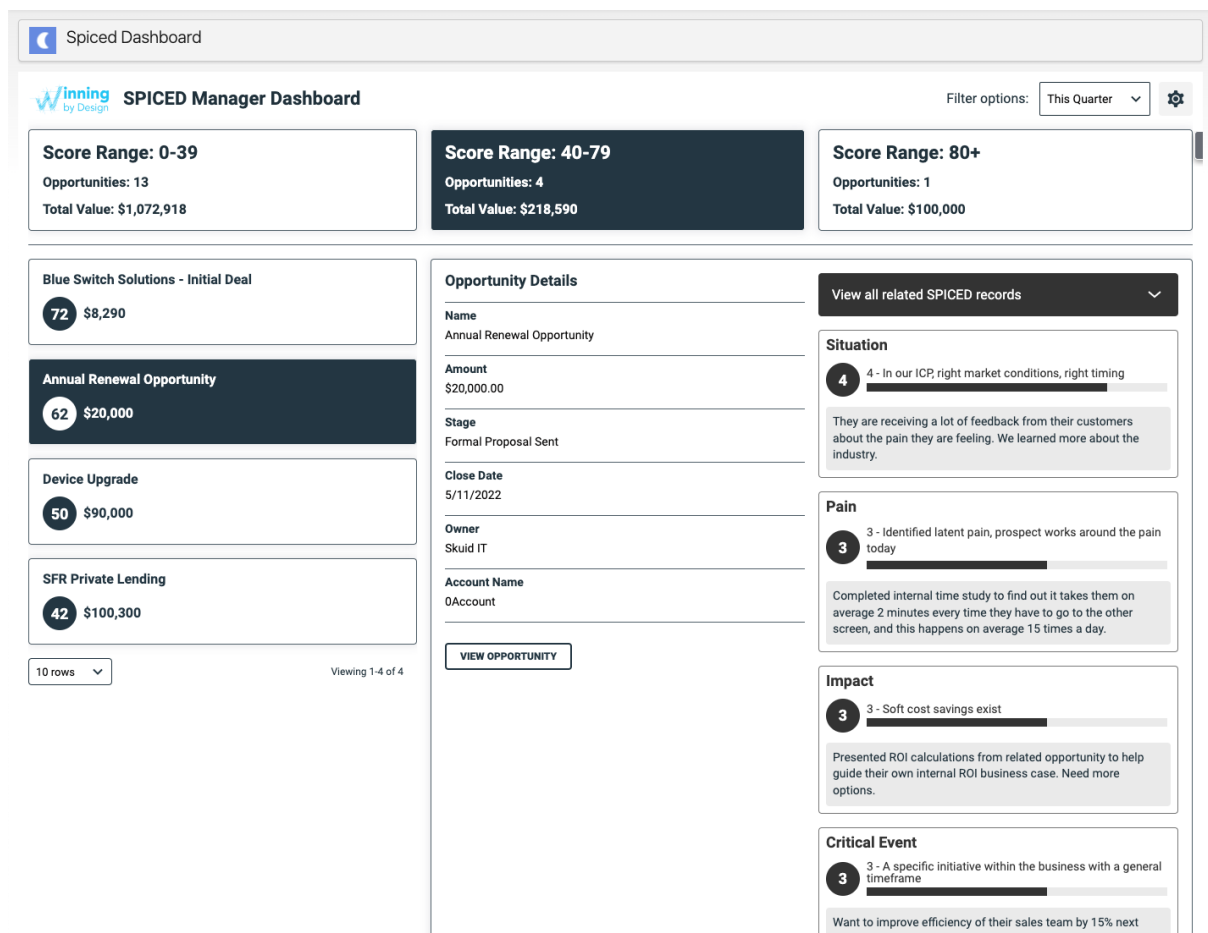


After saving edits to the qualification score, a new SPICED record connected to the opportunity will be created in a custom object for SPICED records. This allows the component to show past qualification scores.

Click on the header of the SPICED component to view past qualification scores.

Dashboard component

Opportunities with qualification scores will appear in the SPICED dashboard component.



Spiced Dashboard

Winning by Design SPICED Manager Dashboard

Filter options: This Quarter

Score Range: 0-39	Score Range: 40-79	Score Range: 80+
Opportunities: 13 Total Value: \$1,072,918	Opportunities: 4 Total Value: \$218,590	Opportunities: 1 Total Value: \$100,000

Blue Switch Solutions - Initial Deal

72 \$8,290

Annual Renewal Opportunity

62 \$20,000

Device Upgrade

50 \$90,000

SFR Private Lending

42 \$100,300

10 rows Viewing 1-4 of 4

VIEW OPPORTUNITY

Opportunity Details

Name
Annual Renewal Opportunity

Amount
\$20,000.00

Stage
Formal Proposal Sent

Close Date
5/11/2022

Owner
Skuid IT

Account Name
0Account

View all related SPICED records

Situation

4 4 - In our ICP, right market conditions, right timing

They are receiving a lot of feedback from their customers about the pain they are feeling. We learned more about the industry.

Pain

3 3 - Identified latent pain, prospect works around the pain today

Completed internal time study to find out it takes them on average 2 minutes every time they have to go to the other screen, and this happens on average 15 times a day.

Impact

3 3 - Soft cost savings exist

Presented ROI calculations from related opportunity to help guide their own internal ROI business case. Need more options.

Critical Event

3 3 - A specific initiative within the business with a general timeframe

Want to improve efficiency of their sales team by 15% next

Select an opportunity from the dashboard to see details for that record.

Use the filter in the top right-hand corner to focus on a specific period of time.



Feedback

Thanks for trying out the SPICED module in your Salesforce org!

We do want your feedback. If you find errors or usability issues or just have thoughts on how we can make this a better experience please send feedback to spiced@skuid.com.